



Filing ID #10023377

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Goutam Umesh Jois
Status: Congressional Candidate
State/District: NJ07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/16/2018
Period Covered: 01/01/2017– 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
E. Jois UBS Roth IRA ⇒ SPDR S&P 500 ETF TR [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois UBS Roth IRA ⇒ UBS BANK USA DEP ACCT [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois UBS Roth IRA ⇒ VANGUARD TOTAL STOCK MKT ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ AmericanFunds EuroPacific R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ AmericanFunds Growth Fnd R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ AmericanFunds Nw Prspctv R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ Eaton Vance-AtlantaCap SMID-Cp F R6	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
E. Jois Voya Retirement Acct ⇒ JPMorganEquity IncomeFund R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ VanguardLifeStrat Growth Fd Inv [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ VanguardMid-Cap IndexFund Adm [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA [IH]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Roth IRA [IH]		\$15,001 - \$50,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ ISHARES CORE S&P 500 ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ SPDR S&P 500 ETF TR [EF]		\$1,001 - \$15,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ UBS BANK USA DEP ACCT [IH]		\$15,001 - \$50,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ VANGUARD TOTAL STOCK MKT ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		
G. Jois Voya 401k ⇒ EuroPacific Growth Class R-6 [MF]		\$15,001 - \$50,000	Tax-Deferred		
G. Jois Voya 401k ⇒ T Rowe Price Balanced [MF]		\$1,001 - \$15,000	Tax-Deferred		
G. Jois Voya 401k ⇒ Vanguard S&P Mid Cap 400 Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
G. Jois Voya 401k ⇒ Vanguard Small Cap ValueIndex [MF]		\$1,001 - \$15,000	Tax-Deferred		
G. Jois Voya 401k ⇒ Vanguard TotalBond Market [MF]		\$1,001 - \$15,000	Tax-Deferred		
G. Jois Voya 401k ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VanguardS&P 500 Inst Ind Fund [MF]					
J.P. Morgan Chase Checking [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Real Property in New York, NY [RP]		\$500,001 - \$1,000,000	Rent	None	\$2,501 - \$5,000
LOCATION: New York, NY, US					
UBS RMA Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
JCMS Inc.	Legal services	\$50,000.00	\$40,000.00
Gibson, Dunn & Crutcher LLP	Salary	N/A	\$285,004.66
New York Legal Assistance Group Inc.	Spouse salary	\$27,693.93	\$70,900.48

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	J.P. Morgan Chase Bank	January 2011	Mortgage	\$250,001 - \$500,000
	U.S. Department of Education	August 2004	Student Loans	\$50,001 - \$100,000
SP	Citibank	August 2004	Student loan	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Young Trustee	Atlas Service Corps Inc
Director	JCMS Inc

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- E. Jois UBS Roth IRA (Owner: SP)
- E. Jois Voya Retirement Acct (Owner: SP)
- G. Jois UBS Roth IRA
- G. Jois Voya 401k

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mr. Goutam Umesh Jois , 05/16/2018